

**Achievement of Market-Friendly Initiatives and Results Program  
(AMIR 2.0 Program)**

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**Business Association Training**

Final Report

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*This report was prepared by the Center for International Private Enterprise (CIPE) team of Jean Rogers, Stephen Bower, and Fred Whiting in collaboration with Chemonics International Inc., prime contractor to the U.S. Agency for International Development for the AMIR Program in Jordan.*



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## **Report to Chemonics International**

### **CIPE Business Association Training**

#### **S.O.W. 233.1 Business Association Management Training**

This consultancy focused on developing the associations' strategies and work plans through a workshop for business association executives. Held at the Dead Sea, the workshop provided an opportunity for participants to focus on their organizational strategies, member services, and outreach skills. Before the workshop, trainers received voluminous documentation about the organizations' past plans and performance, observed several of the participating associations during a planning workshop, and had the opportunity to meet several associations individually. This was extremely useful in setting the stage and enriched the discussions to address specific examples from the associations' experience.

Presentations by each of the three trainers effectively set the stage for group discussion and exercises; copies of all slides as well as additional reading material were provided to participants to provide an on-going reference. The modules covered, chosen from CIPE's 26 standard association management modules, and their overarching goals were:

- *Overview of Associations and Their Role*
  - Define a business association and its role in the community
  - Understand the different types of associations and chambers and the role of members, volunteers and staff
  - Understand the importance of organizational charts, by-laws, mission statement, public policy, program of work, membership marketing plans, procedures manual, financial plans and communications plans in order to further examine the development of these products later in the training
- *Strategic Planning*
  - Define strategic planning
  - Understand some of the constraints on the effectiveness of strategic planning in voluntary organizations
  - Identify the step-by-step activities involved in strategic planning
  - Understand how to develop or review their organizational mission statement, objectives and programs of work
- *Financial Management*
  - Understand the importance of financial planning
  - Understand the budgeting process and different types of budgets
  - Understand the importance of recording, reporting, and control mechanisms for their organization
  - Understand financial reporting's relationship to program management
- *Governance and Human Resources*
  - Examine why boards often perform poorly
  - Identify fundamental characteristics of "leadership" boards



- Evaluate the role of boards in five key areas: planning, operations, external relations, financial resource development, and the board function itself
- Focus on the “change management” function of boards
- Consider the Board-CEO relationship
- Review oversight and monitoring tools that facilitate good governance and effective board performance
- Learn about personnel procedures and appropriate tools such as job descriptions and performance reviews
- Discuss how to build effective teams and manage those teams through leadership, communication, motivation, delegation and conflict management
- *Membership Development*
  - Understand the importance of membership to overall association programs
  - Understand the different types of membership structures, bases and categories
  - Understand the importance of membership records
  - Understand which products attract members
  - Understand how to develop a marketing campaign and marketing tools
  - Understand how to develop a dues structure which reflects services
  - Understand how to retain members
- *Leadership*
  - Understand the specific behaviors and actions of an exemplary leader
  - Identify their personal strengths as leaders
  - Identify areas for improving their leadership practices
  - Determine actions for becoming better leaders
  - Review ways to apply leadership practices to business association management
- *Communications & Public Relations*
  - Understand the importance of public relations for a business association and what needs to be communicated to whom
  - Discuss the components of a public relations program
  - Identify basic tools and audiences for communications planning
  - Understand the steps of developing a public relations program
  - Understand crisis management from a public relations perspective
- *Marketing*
  - Understand association marketing techniques related to increasing revenues, enhancing volunteer participation and strengthening the organization
  - Learn how to develop association marketing plans to achieve an association’s goals and objectives
  - Comprehend the significance of membership customer service delivered by quality oriented and trained management staff
  - Explore marketing models for selling an association’s membership services and programs



When the instructors met the participants for the first time, it was clear that a significant number of association staff in attendance were new, both to association work and the job market in general, as the majority of attendees had been employed for less than five years. At the other end of the spectrum there were three executive directors with significant association work experience. Presenting information that addressed the skill level of both audiences was a challenge. The younger, less experienced staff participating were challenged to think of themselves as having impact within their organizations, and were in many cases being exposed for the first time to functions outside their specific job. One or two were just learning about their specific job function. Given the participants' relative inexperience in their own jobs and lack of exposure to the broader role of associations, instructors were particularly careful to discuss the relevance of each topic for all positions as well as the association more broadly to encourage participants to see, for example, why they may need to understand a bit about membership development even if they are responsible for administration and vice versa. This was clearly a stretch for some of the participants who had a narrow understanding of their positions and functions, and underscored the need for basic training to build staff depth within the associations. The leadership session in particular was truncated to allow more time on topics of greater relevance to the participants levels.

All participants listened, took notes, and participated in group exercises, and by the end of the 4 days seemed more open to a cross-cutting understanding. The participants who were most comfortable in English and who networked with one another and with the instructors throughout the period clearly maximized the opportunity and developed their own support relationship which will remain. This is especially critical not only for their personal support but also for the development of the association profession as a whole in Jordan. Just as the senior staff of their organizations had exhibited in the earlier planning workshop, these association staffers showed a bond as individuals and recognized each other as being in the same business, willing to share challenges and victories, with little outward evidence of cliques or divisions.

Based on feedback from the participants, the majority of the group left with a better understanding of association management than when they arrived. Training helped to clarify a number of association activities, gave them opportunity to raise issues and confirm if they were on track at their organization. For a significant number of participants, the event was a door-opener to future sharing of information and exchange of materials for critique purposes. Consultants drew many examples and case questions from the participants for the discussions, providing feedback on concrete areas of concern for participants. Given the diversity of the staff positions represented, however, in depth analysis of individual work areas was not possible. The more immediate impact of the training should be to provide these staff members with a better context for understanding their work which will be a stronger foundation upon which to improve their individual contributions to the associations.



## Annex A - PowerPoint Slides